

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE

SECTION A: EXECUTIVE SUMMARY

1.	Electronic Submittal Date	
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Project #	
Date Rec'd	
Doc. Type	

	PFSR	FSR	PCR	SPR	PSP	FSR/ER
2.	Type of Document					
	Document ID #					

3.	Project Title			Estimated Project Dates	
	Project Acronym			Start	End

4.	Submitting Department		Forced Rank Project Priority
5.	Reporting Agency		

6.	Project Objective (brief description, 400 characters]

8.	Project Phasing	Budget
TOTAL PROJECT BUDGET		\$

7.	Proposed Solution (brief description, 400 characters]

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION B: PROJECT CONTACTS

Project #	
Date Rec'd	
Doc. Type	

Executive Contacts								
	First Name	Last Name	Area Code	Phone #	Ext.	Area Code	Fax #	E-mail
Agency Secretary								
Dept. Director								
Budget Officer								
CIO								
Proj. Sponsor								

Direct Contacts								
	First Name	Last Name	Area Code	Phone #	Ext.	Area Code	Fax #	E-mail
Doc. prepared by								
Primary contact								
Project Manager								

INFORMATION TECHNOLOGY PROJECT SUMMARY
SECTION C: PROJECT RELEVANCE TO STATE AND/OR DEPARTMENTAL PLANS

1.	What is the date of your current Operational Recovery Plan (ORP)?	Date			Project #	
2.	What is the date of your current Agency Information Management Strategy (AIMS)?	Date			Date Rec'd	
3.	For the proposed project, provide the page reference in your current AIMS and/or strategic business plan.	Doc.			Doc. Type	
		Page #				

		Yes	No
4.	Is the project reportable to control agencies? (SIMM Volume 1, Policy 5.0)		
	If YES, CHECK all that apply:		
	a) The estimated total development and acquisition cost exceeds the departmental cost threshold. ¹		
	b) A new system development or acquisition that is specifically required by legislative mandate or is subject to special legislative review as specified in budget control language or other legislation. ¹		
	c) The project involves a budget action. ¹		
	d) Acquisition of any microcomputer commodities and the agency does not have an approved Workgroup Computing Policy (WCP).		
	e) Electronic access to private information concerning individuals or entities by entities or individuals other than the entity responsible for data ownership or other entities authorized by law.		
	f) Installation or expansion of wide area network data communication facilities or services other than those acquired through contracts administered by the Department of General Services, or a State consolidated data center as defined in SAM Section 4982.		
	g) Development, acquisition or installation of technologies not currently supported by the department or not currently supported by a State consolidated data center.		
	h) Development and/or purchase of systems to support activities as defined by the DOIT's Enterprise Systems Report. ²		
	i) Acquisition or upgrade of a multi-user central processing unit, except for previously approved projects as defined under SAM 4819.2, or servers being used only for departmental Office Automation functions		
¹	The DOIT will forward a copy of the FSR meeting these reporting criteria to the Department of Finance (DOF).		
²	The DOIT will forward a copy of the FSR to the DOF's (CALSTARS Unit) if it is determined the business case or proposed solution is related to financial accounting systems.		

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION D: PROJECT SCHEDULE

Project #	
Date Rec'd	
Doc. Type	

MAJOR MILESTONES		
	Description	Planned Delivery Date Relative to Project Start
1.		
2.		
3.		
4.		
5.		

KEY DELIVERABLES		
	Description	Planned Delivery Date Relative to Project Start
1.		
2.		
3.		
4.		
5.		

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE

SECTION E: BUDGET INFORMATION

Project #	
Date Rec'd	
Doc. Type	

Budget Augmentation Required?									
No									
Yes		If YES, indicate fiscal year(s) and associated amount:							
FY		FY		FY		FY		FY	
\$		\$		\$		\$		\$	

PROJECT COSTS

1.	Fiscal Year	Data for this section will be derived from the EAW						TOTAL
2.	One-Time Cost							\$
3.	Continuing Costs							\$
4.	TOTAL PROJECT BUDGET	\$	\$	\$	\$	\$	\$	

SOURCES OF FUNDING

5.	General Fund						\$
6.	Redirection	Data for REDIRECTION will be derived from the EAW					\$
7.	Reimbursements						\$
8.	Federal Funds						\$
9.	Special Funds						\$
10.	Grant Funds						\$
11.	Other Funds						\$
12.	NET PROJECT BUDGET	\$	\$	\$	\$	\$	\$

PROJECT FINANCIAL BENEFITS

13.	Cost Savings/Avoidances	Data for this section will be derived from the EAW						\$
14.	Revenue Increase							\$
15.	Net (Cost) or Benefit							\$

Note: The totals in Item 4 and Item 12 must have the same cost estimate.

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION F: VENDOR PROJECT BUDGET

VENDOR FSR COST

Vendor Cost for FSR Development (if applicable)	\$	
Vendor Name		

Project #	
Date Rec'd	
Doc. Type	

VENDOR PROJECT BUDGET

1.	Fiscal Year						TOTAL
2.	Primary Vendor Budget						\$
3.	Independent Oversight Budget						\$
4.	DOIT Oversight Budget						\$
5.	TOTAL VENDOR BUDGET	\$	\$	\$	\$	\$	\$

------(Applies to SPR only)-----

PRIMARY VENDOR HISTORY SPECIFIC TO THIS PROJECT

6.	Primary Vendor/Organization	
7.	Contract Start Date	
8.	Contract End Date (projected)	
9.	Amount	\$

PRIMARY VENDOR CONTACTS

	Vendor	First Name	Last Name	Area Code	Phone #	Ext.	Area Code	Fax #	E-mail
10.									
11.									
12.									

SECTION G: RISK ASSESSMENT INFORMATION

Project #	
Date Rec'd	
Doc. Type	

RISK ASSESSMENT

	Risk Assessment Model (RAM)	Score	Rating
1.	Strategic Risk		
2.	Financial Risk		
3.	Project Management Risk		
4.	Technology Risk		
5.	Change Management & Operation Risk		
6.	OVERALL RISK SCORE		

7.	Date of current RAM	
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		Yes	No
8.	Has a Risk Management Plan been developed for this project?		

General Comment(s)	

INFORMATION TECHNOLOGY PROJECT SUMMARY PACKAGE
SECTION H: PROJECT PROFILE

Project #	
Date Rec'd	
Doc. Type	

PROJECT PROFILE INFORMATION

1.	Implementation Approach:
	Purchase and Integrate
	In-house Development
	Vendor Development

2.	Project Type:
	Application Development
	Artificial Intelligence
	C.A. Dispatch
	C.A. Design
	C.A.S.E.
	Client Server
	Database
	E-mail/Messaging
	EC/EDI
	EDI
	EFT
	Expert System
	Imaging
	G.I.S.
	LAN
	Mainframe
	Office Automation
	Telecomm
	WAN
	WEB Technology
	Other:

3.	Business Program/Practice:
	Asset Management
	Case Management
	Contract Management
	Document Tracking
	Financial
	Fingerprint
	General Accounting
	Human Resources
	Law Enforcement
	Law Enforcement/AFIS
	Licensing
	Procurement
	Reg and Titling
	Project Management
	Telecommunication
	Workflow
	Workload Management
	Other:

4.	Outsourced Components
	Application Development
	Contract Manager
	Database Design
	Facilities Manager
	Hardware
	Independent Oversight
	Telecommunications
	Project Manager

4.	Outsourced Components (continued)
	Quality Assurance
	Site Prep
	Software Developer
	Systems Analyst
	Systems Integrator
	Other:

5.	Operating System:

6.	Hardware Platform:

7.	Database Engine:

8.	Messaging Engine

9.	WEB Server

10.	Development Tools

11.	Network Protocols